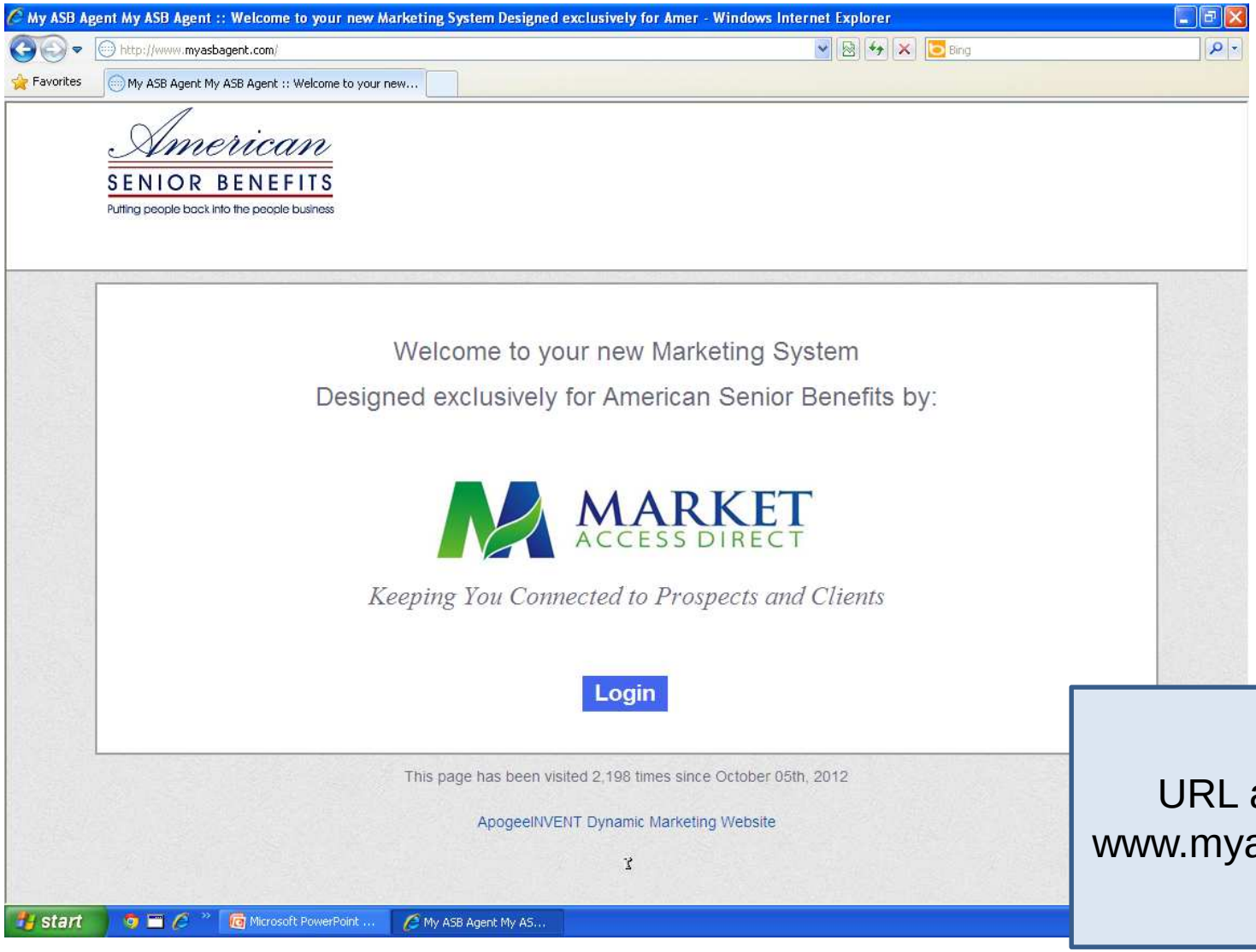
User Manual

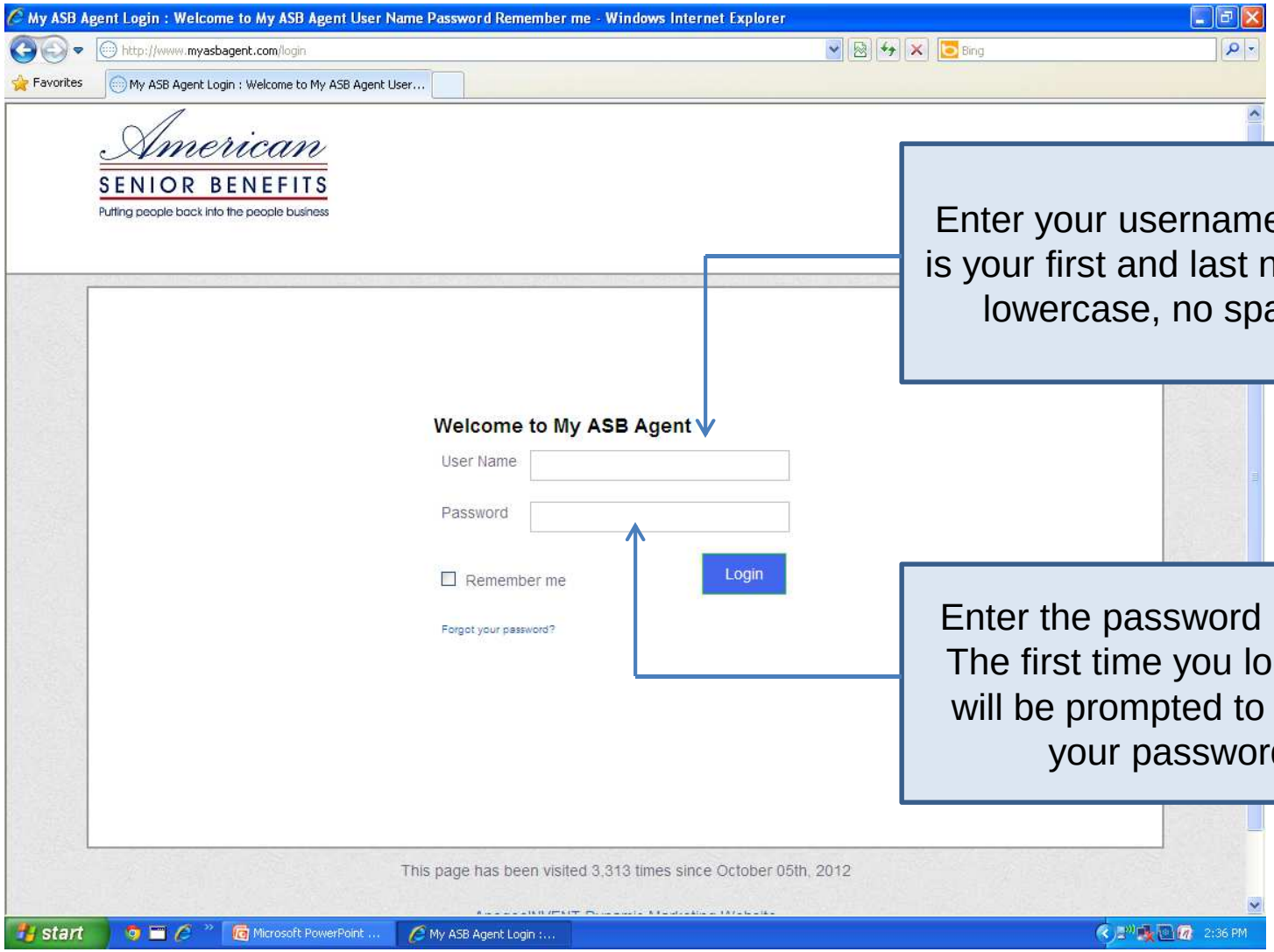
System Instructions

The Contact Management System


My ASB Agent My ASB Agent :: Welcome to your new Marketing System Designed exclusively for Amer - Windows Internet Explorer
http://www.myasbagent.com/
Favorites
My ASB Agent My ASB Agent :: Welcome to your new...
American
SENIOR BENEFITS
Putting people back into the people business
Welcome to your new Marketing System
Designed exclusively for American Senior Benefits by:
MARKET
ACCESS DIRECT
Keeping You Connected to Prospects and Clients
Login
This page has been visited 2,198 times since October 05th, 2012
ApogeeINVENT Dynamic Marketing Website
start
Microsoft PowerPoint ...
My ASB Agent My AS...

URL address is:
www.myasbagent.com

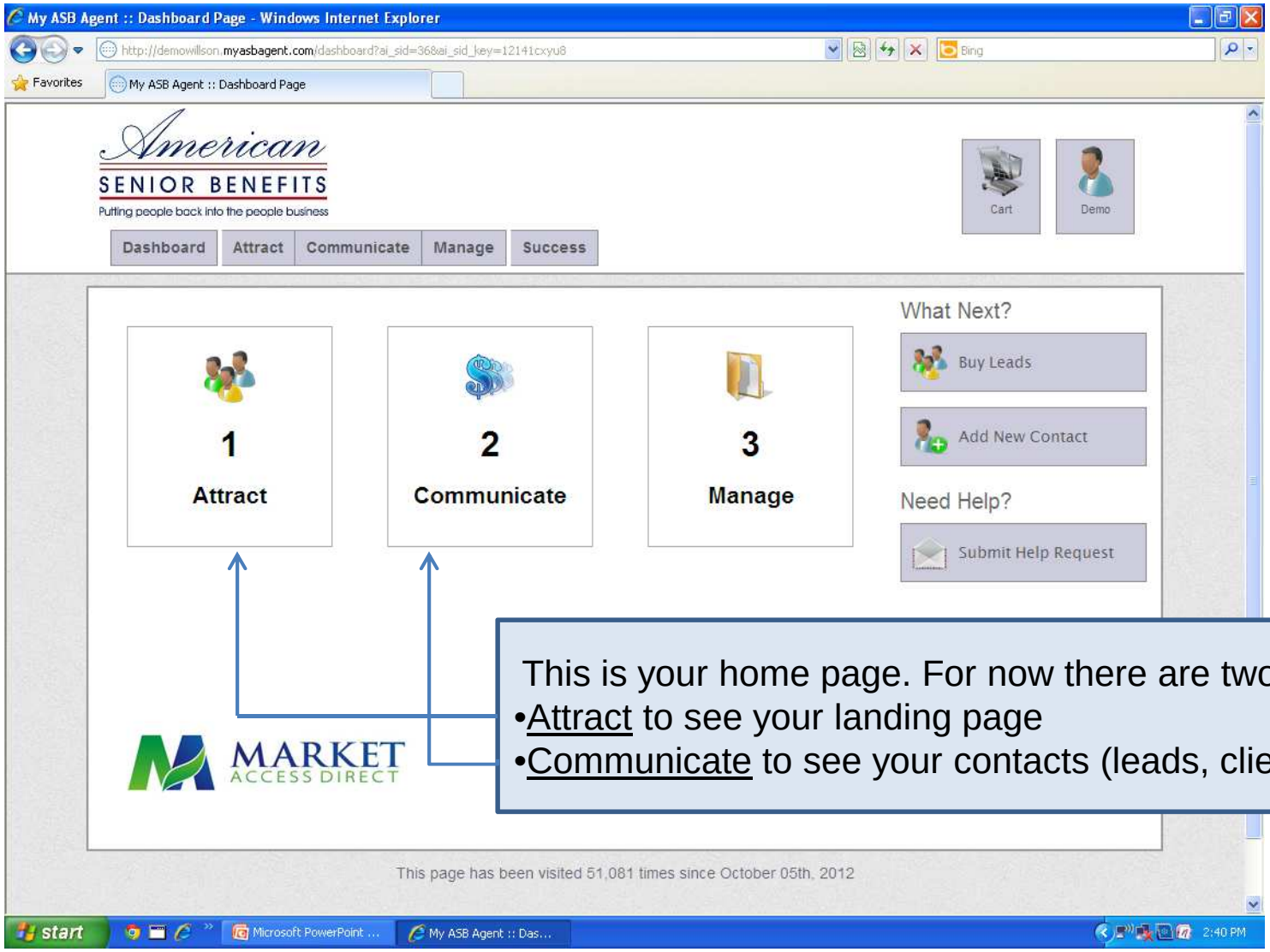
Logon to the System


My ASB Agent Login : Welcome to My ASB Agent User Name Password Remember me - Windows Internet Explorer
http://www.myasbagent.com/login
Favorites
My ASB Agent Login : Welcome to My ASB Agent User...
American
SENIOR BENEFITS
Putting people back into the people business
Welcome to My ASB Agent
User Name
Password
Remember me
Login
Forgot your password?
This page has been visited 3,313 times since October 05th, 2012
start
Microsoft PowerPoint ...
My ASB Agent Login :...
2:36 PM

Enter your username, which is your first and last name, all lowercase, no spaces.

Enter the password Intro123 The first time you log in you will be prompted to change your password.

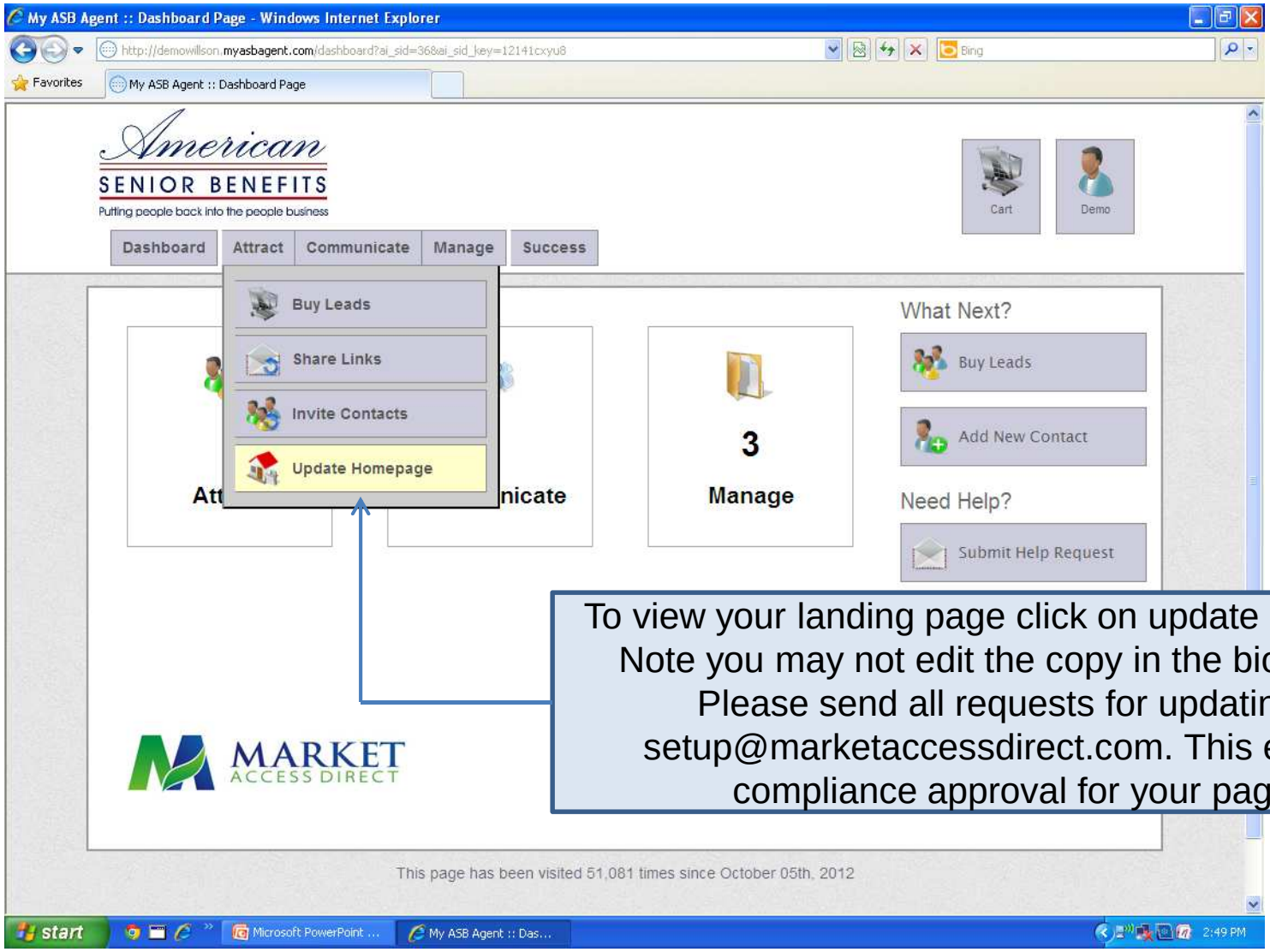
Functionality



This is your home page. For now there are two active tabs:

- Attract to see your landing page
- Communicate to see your contacts (leads, clients, names)

Access Personalized Web Page

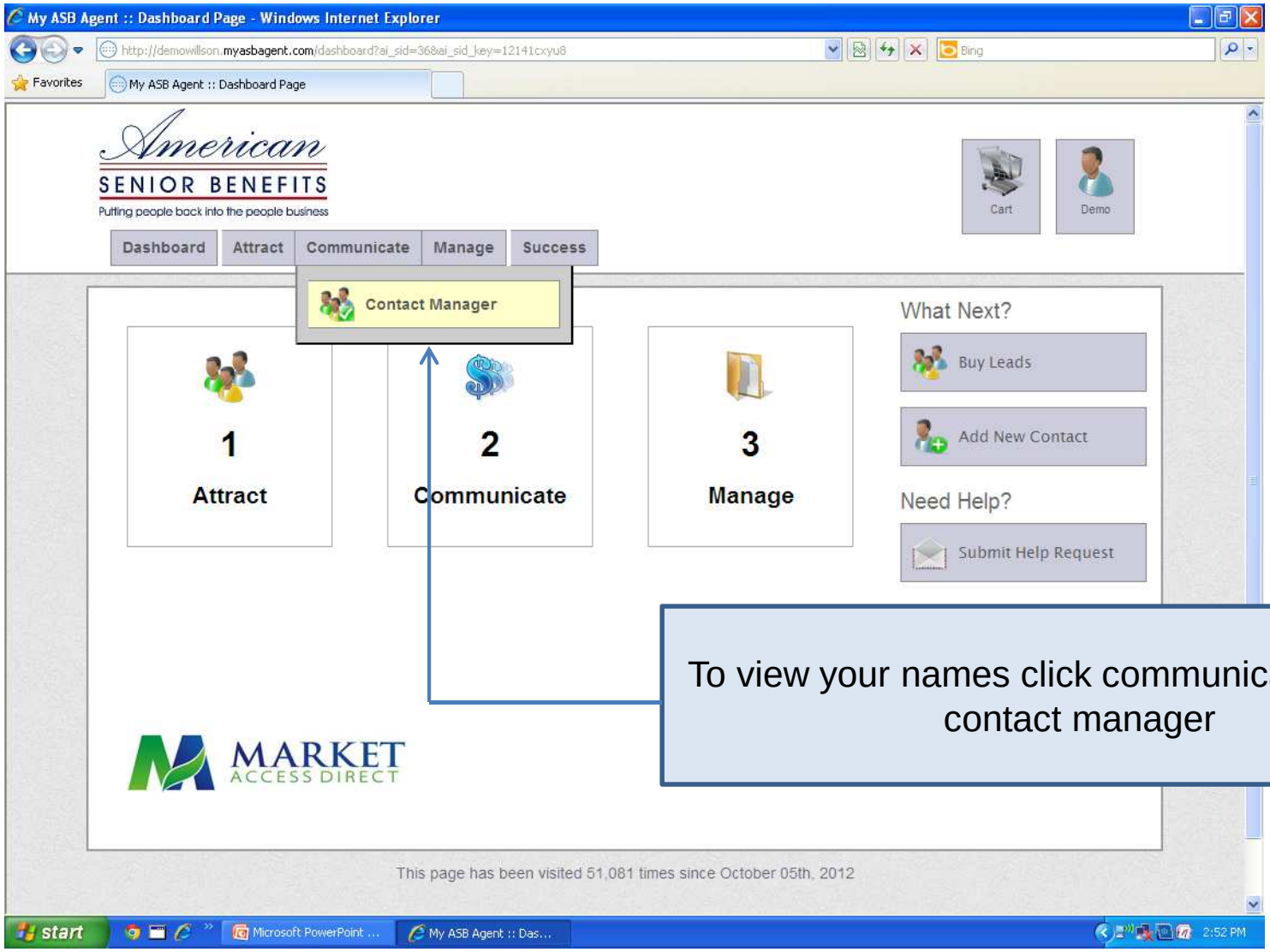


To view your landing page click on update homepage. Note you may not edit the copy in the bio section. Please send all requests for updating to setup@marketaccessdirect.com. This ensures compliance approval for your page.

Agent Web Page

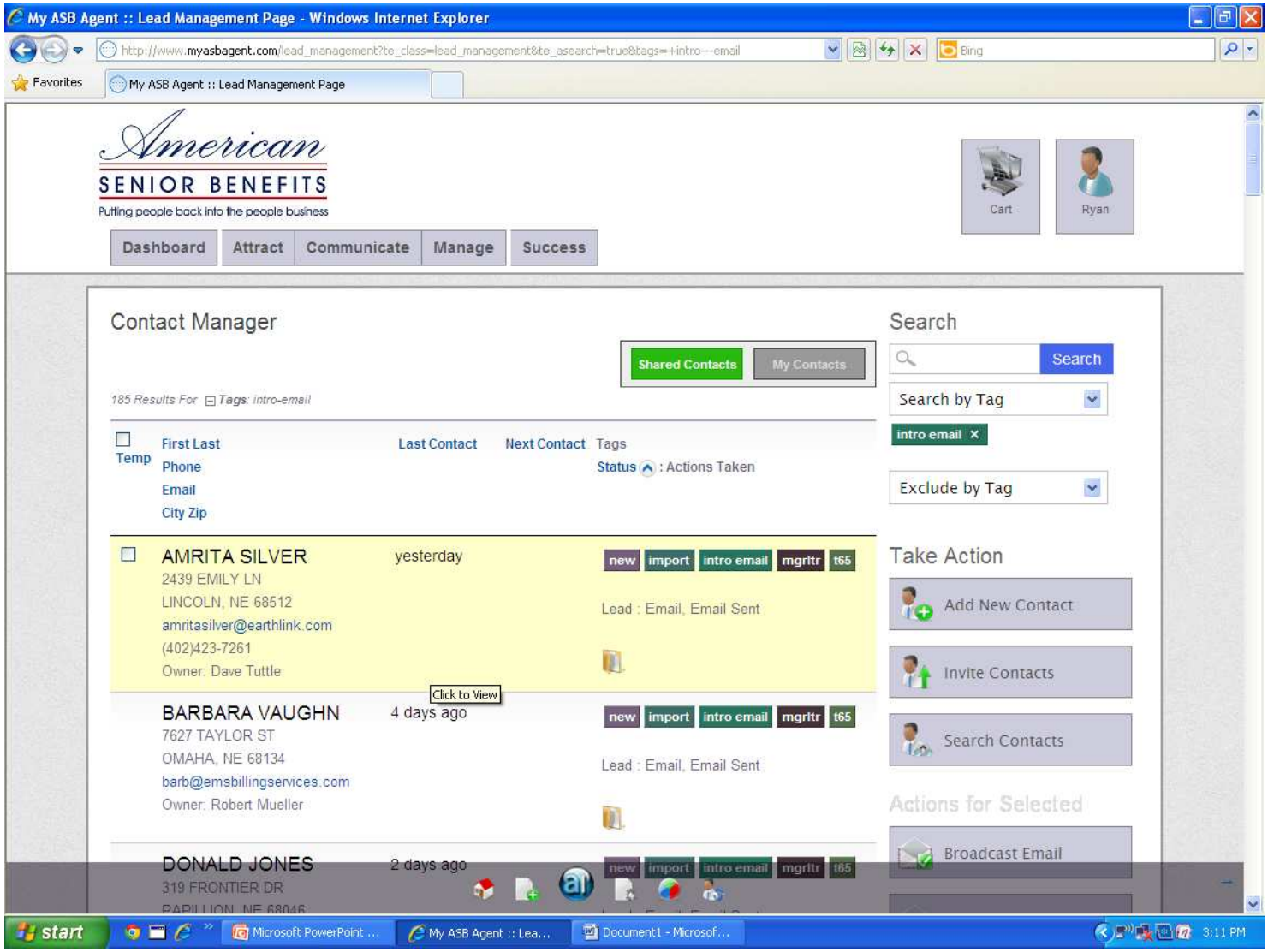
American Senior Benefits - Bob Mueller, Jr. - Windows Internet Explorer
http://www.myasbagent.com/profile?te_class=user_profiles&te_mode=view&te_key=36&ai_skin=full_pa
Favorites
American Senior Benefits - Bob Mueller, Jr.
ASB Service Spotlight
Bob Mueller, Jr.
Insurance Agent
PHONE 402-981-9055
3345 N 107th Street
Omaha Nebraska 68134
American SENIOR BENEFITS
robertmueller@myasbagent.com
robertmueller.myasbagent.com
At American Senior Benefits, we're dedicated to helping America's growing senior population. We start by knowing Medicare inside and out. We work to help seniors get the coverage they need to stay healthy and secure. We can also help them find financial instruments to stay financially secure. We're proud of what we do and happy to help. We look forward to providing the assistance and service you need.
Bob Mueller Jr. has over 11 years of experience working with seniors to help their families achieve financial security from unforeseen loss due to Medical, Long Term Care, and Final Expenses. His goal is to help his clients ease the financial burden that these expenses can create.
Bob was born, raised and attended college in Lincoln, majoring in Marketing. He and his wife Laura live in Omaha where they are raising their three beautiful children; Megan, Clinton and London.
CONTACT BOB TODAY
If you have any questions about our plans or Medicare in general, give Bob a call. He'll be glad to offer useful information, insights, and advice.
PHONE 402-981-9055 robertmueller@myasbagent.com robertmueller.myasbagent.com
INFORMATION CENTER
General Medicare
start
Norton Internet Secu...
Workspace Webmail :...
American Senior Bene...
Microsoft PowerPoint ...
1:08 PM

Contact Manager



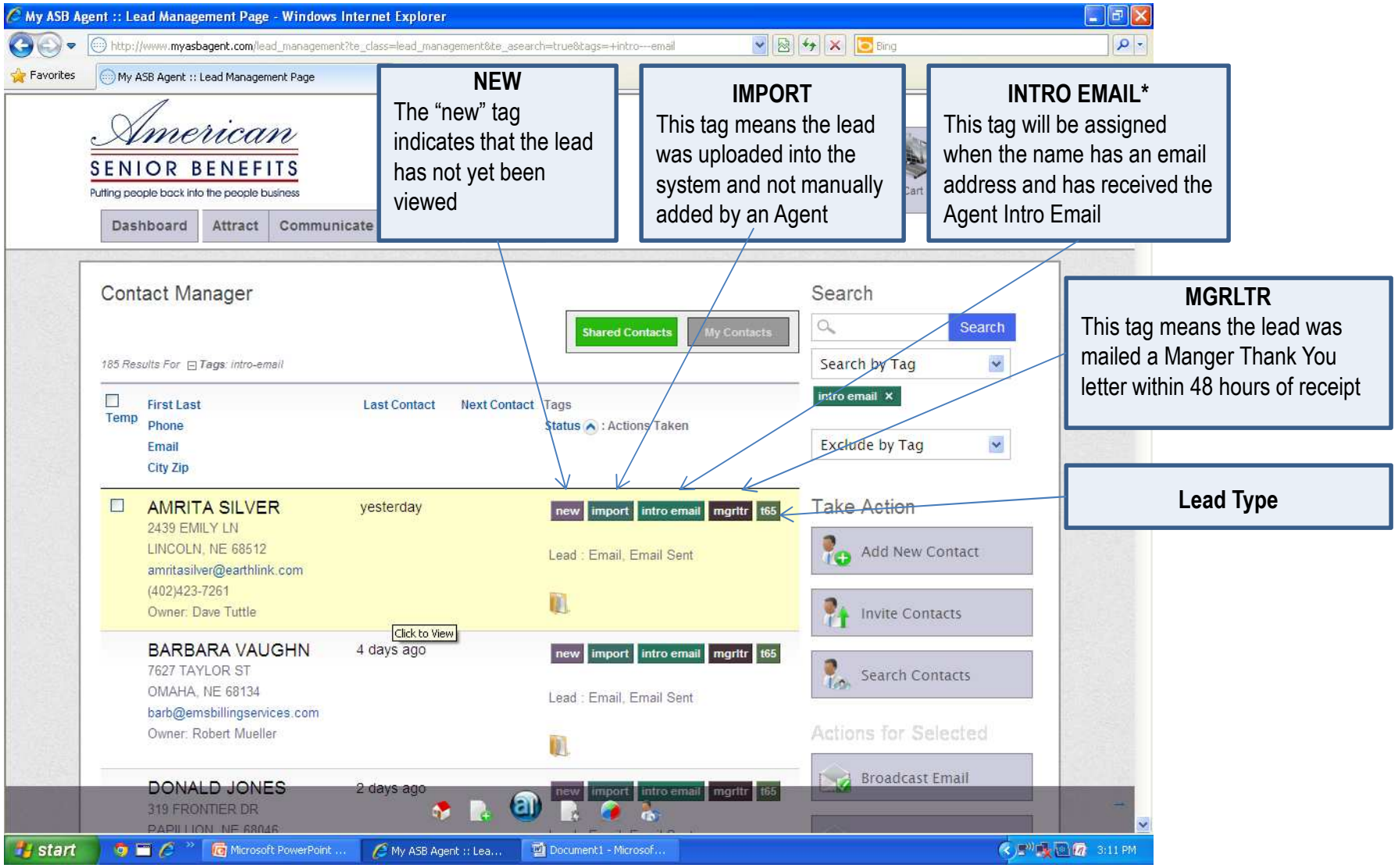
To view your names click communicate and then contact manager

Contact List View

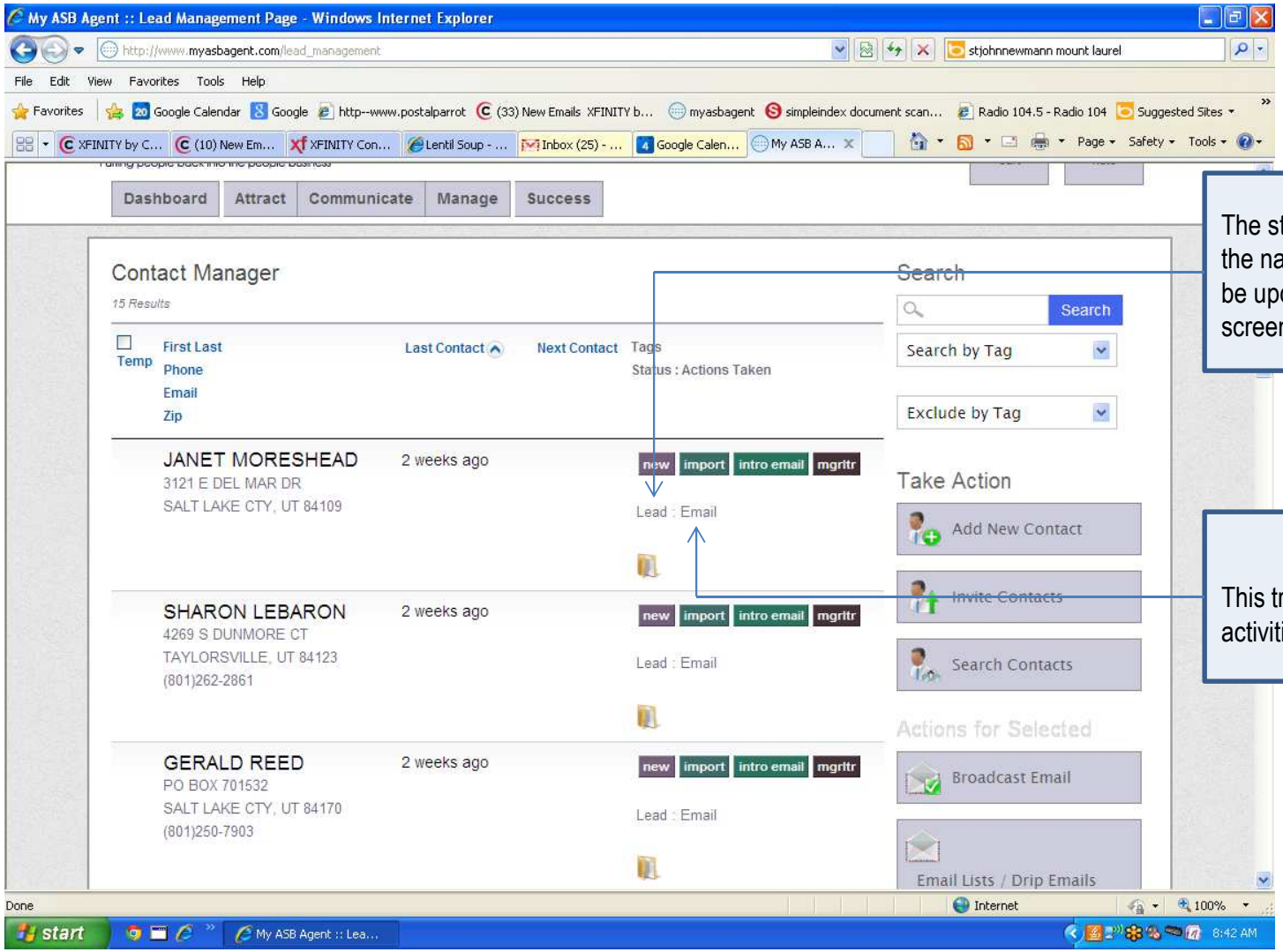


Tags

A Tag describes the type of contact.
Tags get automatically added during the import process when emails are automatically generated, and you ca also add your own.


My ASB Agent :: Lead Management Page - Windows Internet Explorer
NEW
The "new" tag indicates that the lead has not yet been viewed
IMPORT
This tag means the lead was uploaded into the system and not manually added by an Agent
INTRO EMAIL*
This tag will be assigned when the name has an email address and has received the Agent Intro Email
MGRLTR
This tag means the lead was mailed a Manger Thank You letter within 48 hours of receipt
Lead Type
Contact Manager
Search
Shared Contacts
My Contacts
Search by Tag
intro email
Exclude by Tag
Take Action
Add New Contact
Invite Contacts
Search Contacts
Actions for Selected
Broadcast Email
AMRITA SILVER
yesterday
new import intro email mgrltr t65
Lead : Email, Email Sent
BARBARA VAUGHN
4 days ago
DONALD JONES
2 days ago

Status and Activities



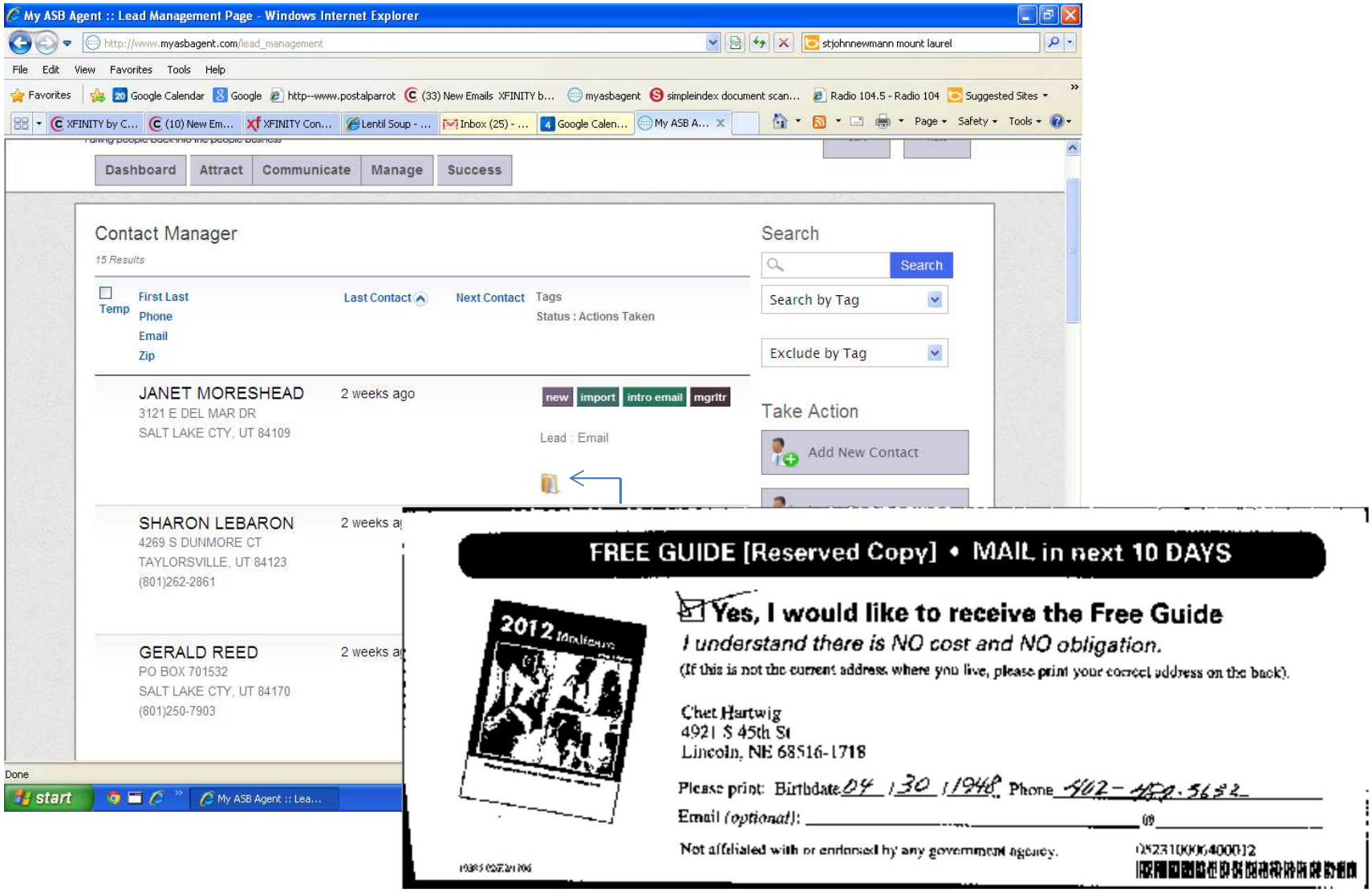
STATUS

The status gets added when the name is imported and can be updated on the detail screen

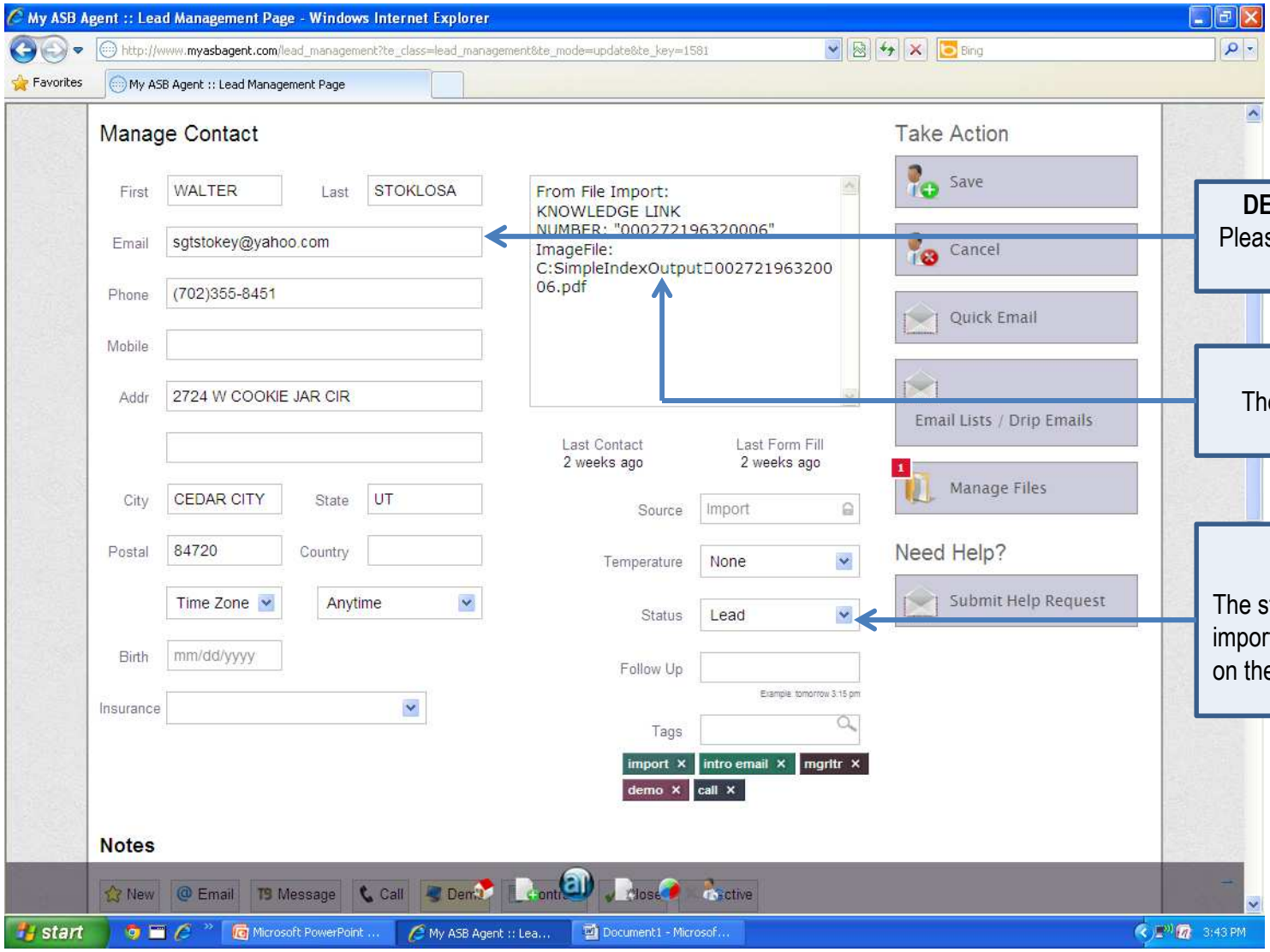
ACTIVITIES

This tracks communications activities

Viewing Your Lead Card



Contact Details & Collecting Info



DETAILS ON CONTACT
Please, please, please collect email address!

NOTES
The notes section can be searched against

STATUS
The status gets added when imported but can be updated on the detail screen

Contact Details & Collecting Info